

ECONOMIC PERFORMANCE

ITALIAN
TANNING
INDUSTRY

YEAR
2020

UNIC 
CONCERIE ITALIANE



PRELIMINARY NOTES

0

Due to the effects caused by **Covid-19**, 2020 was a **year completely outside the ordinary** for the global economy.

The Italian tanning industry, similarly to many other sectors, has been heavily affected by the consequences of the pandemic and the **annual market results** therefore appear almost all **strongly negative**.

After the substantial interruption of production suffered during the first lockdown in spring, the recovery of production from May onwards took place at **reduced levels** due to an extremely complicated trend in demand and consumption of products along the supply chain. The recovery expected for the last part of the year was then heavily dampened by the second pandemic wave, which occurred in autumn.

Declines, both in national and regional production and foreign trade data and in those relating to individual production segments, **are substantially all double-digit**, albeit often with very different intensities. The **only exception** to the negative picture in this sector were leathers destined to **upholstered furniture**.

Given that the pandemic has indiscriminately affected the leather supply chain worldwide, the Italian tannery has not suffered any negative consequences in its **leadership role in the sector**.



ITALIAN
TANNING
INDUSTRY
OVERVIEW

1

UNIC

COMPANIES

1,165 (-1.3%)



EMPLOYEES

17,274 (-1.4%)



VOLUME

97 million square meters
finished leather (-16.4%)7 thousand tons
sole leather (-30.5%)

PRODUCTION VALUE

3.5 billion euros (-23.1%)



EXPORT

2.5 billion euros (-25.4%)



ITALIAN TANNERIES

ITALIAN TANNING INDUSTRY PRODUCTION

2

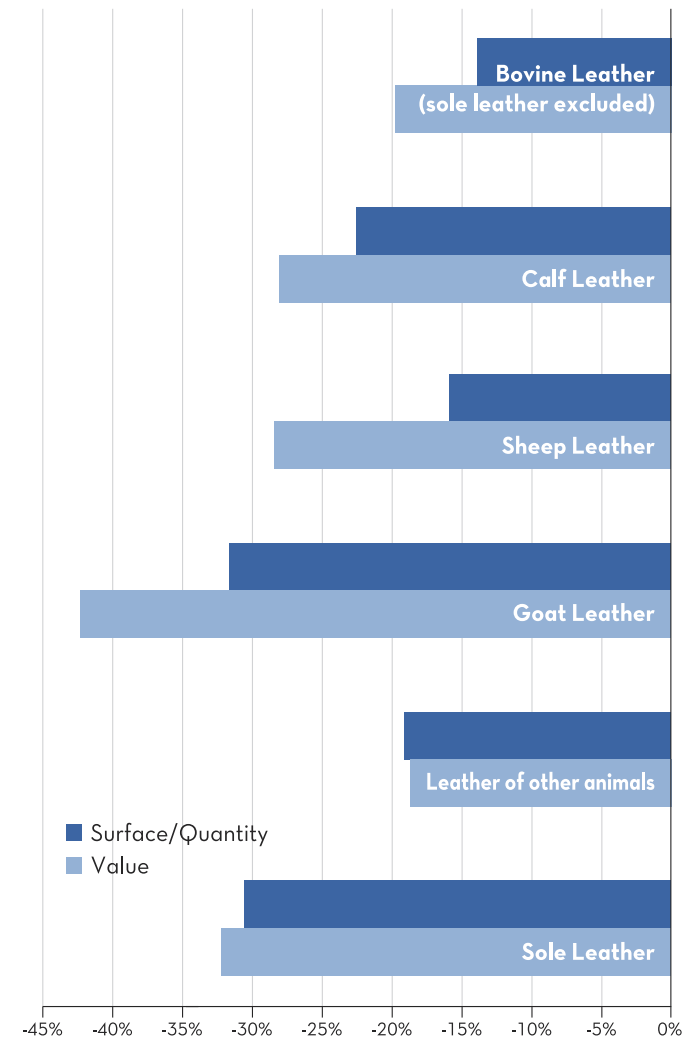
	2020		Var. % '19/'20	
	Volume	Value (million euros)	Volume	Value
Tanning production (volume in '000 sqm)	97,284	3,461	-16.4%	-22.9%
Sole Leather (volume in tons)	6,818	77	-30.5%	-32.2%
Total Production		3,538		-23.1%
Total Export		2,492		-25.4%
Apparent share export/production		70%		



PRODUCTION BY ANIMAL TYPOLOGY

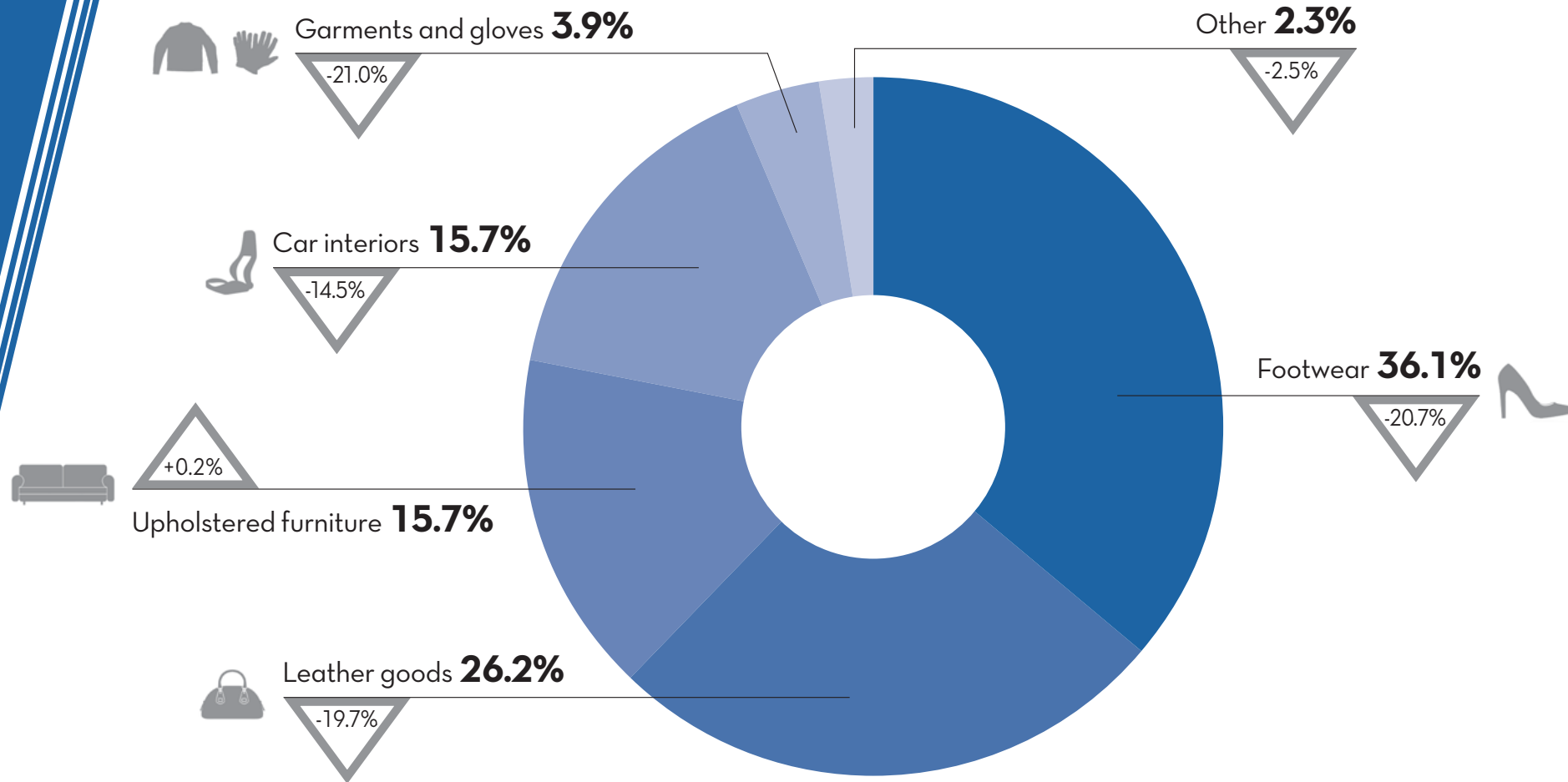
3

	2020	
	Volume (000 000 sqm)	Value (million euros)
Bovine Leather	75.0	2,610.2
Calf Leather	6.6	331.1
Sheep Leather	8.5	242.4
Goat Leather	6.7	188.6
Leather of other animals	0.4	88.8
SUBTOTAL	97.3	3,461.1
Sole leather (tons)	6,818	77.0
TOTAL		3,538.1



PRODUCTION BY DESTINATION USE

4

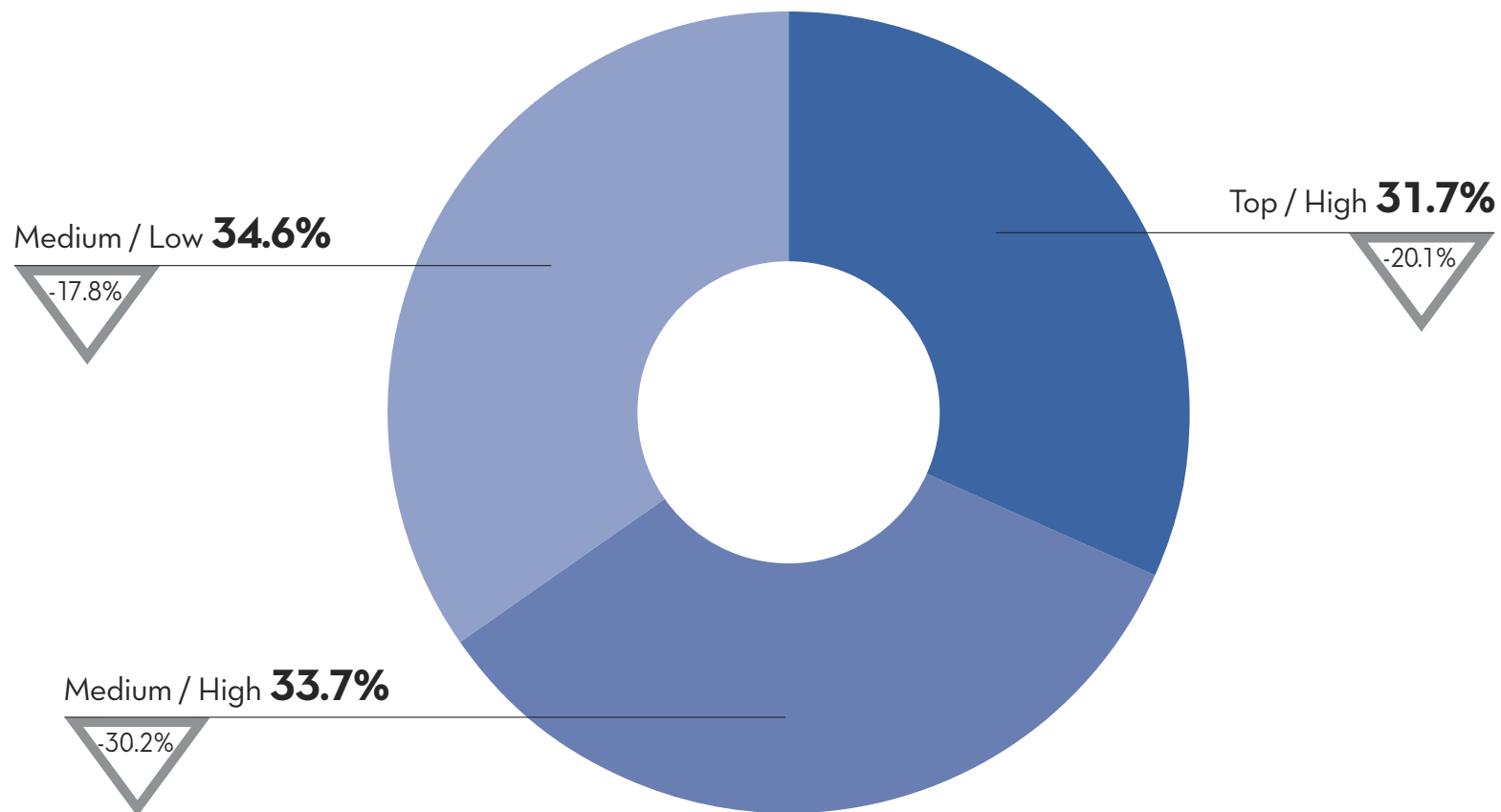


shares on total volume 2020 and variation '19/'20



PRODUCTION BY PRICE RANGE

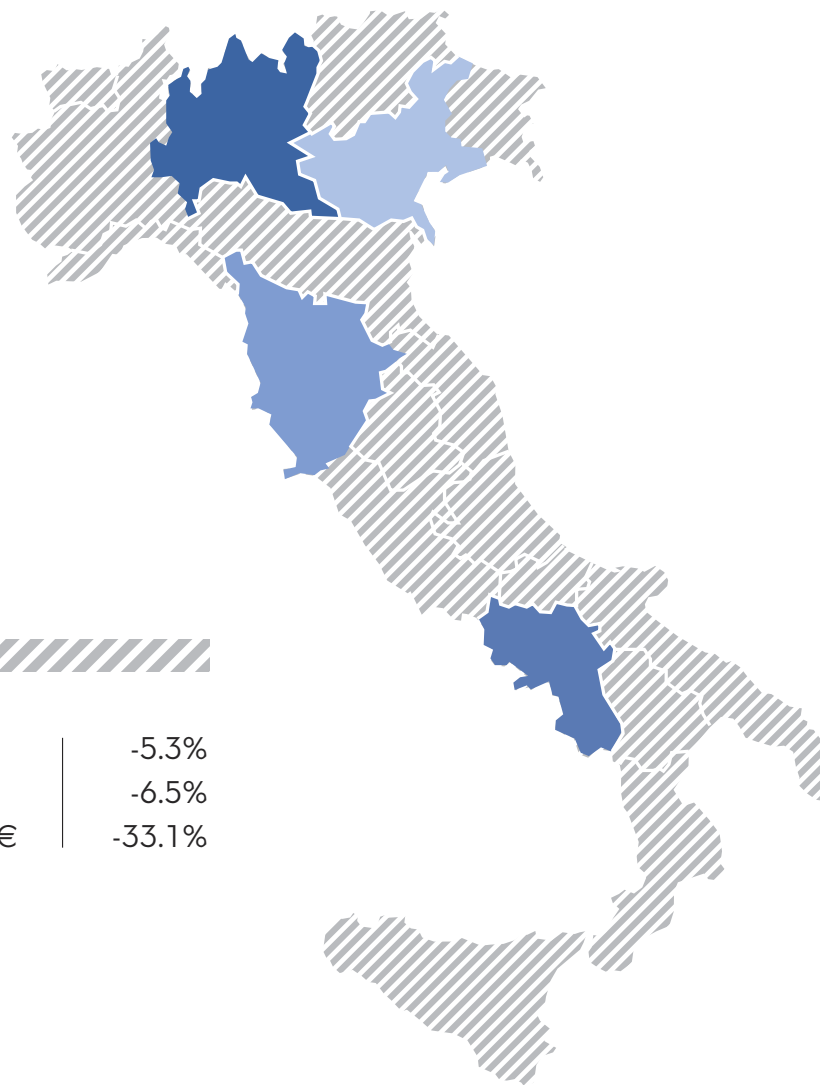
5



shares on total volume 2020 and variation '19/'20



REGIONAL DATA



OTHER REGIONS		
Employees:	591	-5.3%
Companies:	29	-6.5%
Turnover:	83 mln. €	-33.1%

VENETO

Employees:	8,462	-0.4%
Companies:	449	-0.4%
Turnover:	2,179 mln. €	-18.7%

TUSCANY

Employees:	5,604	-1.4%
Companies:	510	-1.2%
Turnover:	930 mln. €	-28.5%

CAMPANIA

Employees:	1,761	-2.7%
Companies:	142	-2.1%
Turnover:	208 mln. €	-30.2%

LOMBARDY

Employees:	856	-5.0%
Companies:	35	-5.4%
Turnover:	138 mln. €	-31.1%

2020 data and '19/'20 variations



INTERNATIONAL LEADERSHIP OF THE ITALIAN TANNING INDUSTRY

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IN EUROPE

63%

of production value



60%

of production volume

WORLDWIDE

23%

of production value



30%

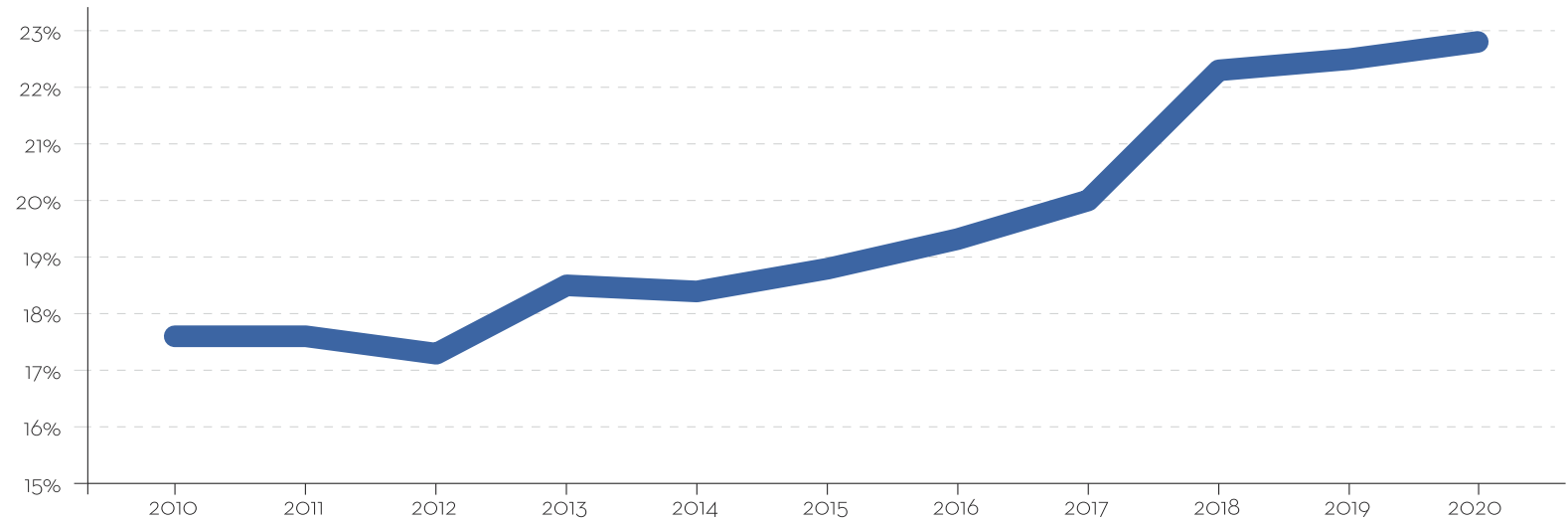
export of finished leather



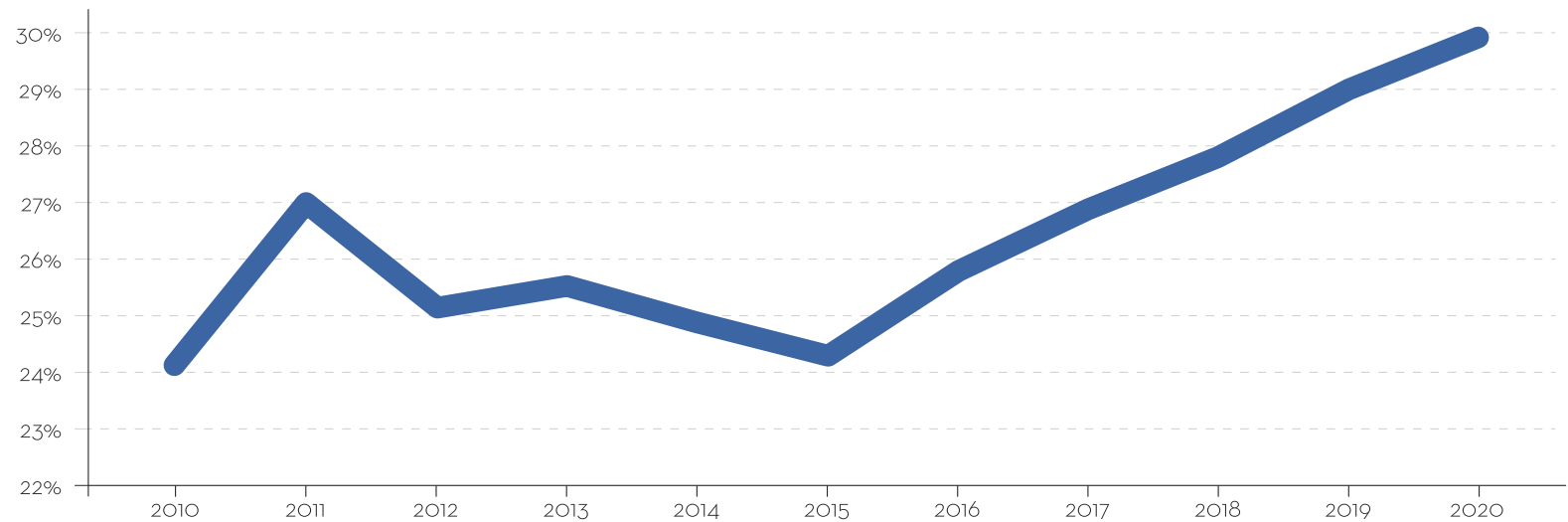
INTERNATIONAL LEADERSHIP OF THE ITALIAN TANNING INDUSTRY

8

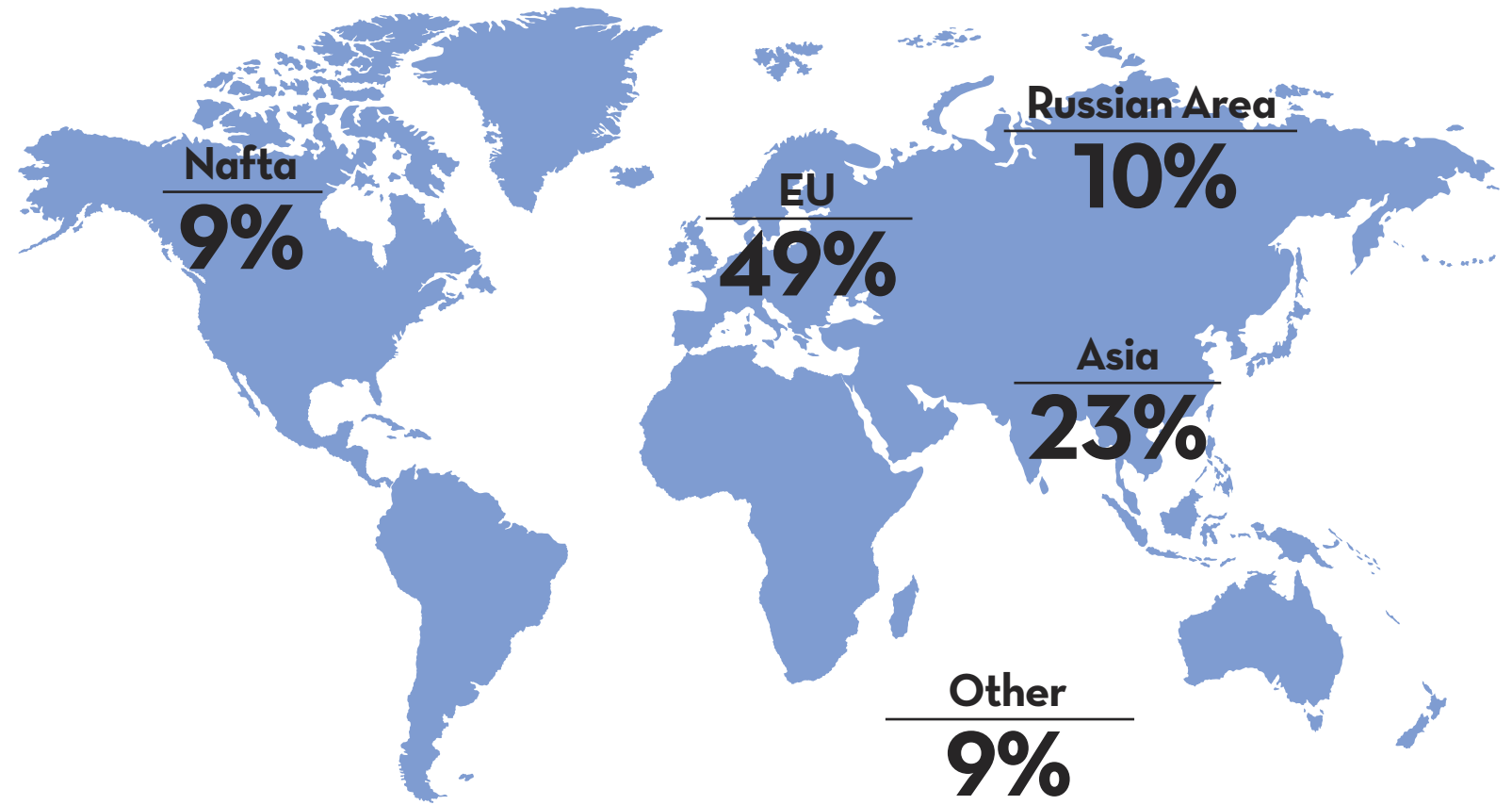
ITALY'S SHARE IN WORLD PRODUCTION VALUE



ITALY'S SHARE IN WORLD EXPORT VALUE



ITALIAN EXPORT OF LEATHER MAIN AREA OF DESTINATION



2.5 billion €  **115** Countries

shares on total value 2020

9



ITALIAN EXPORT OF LEATHER BY MAIN COUNTRY OF DESTINATION

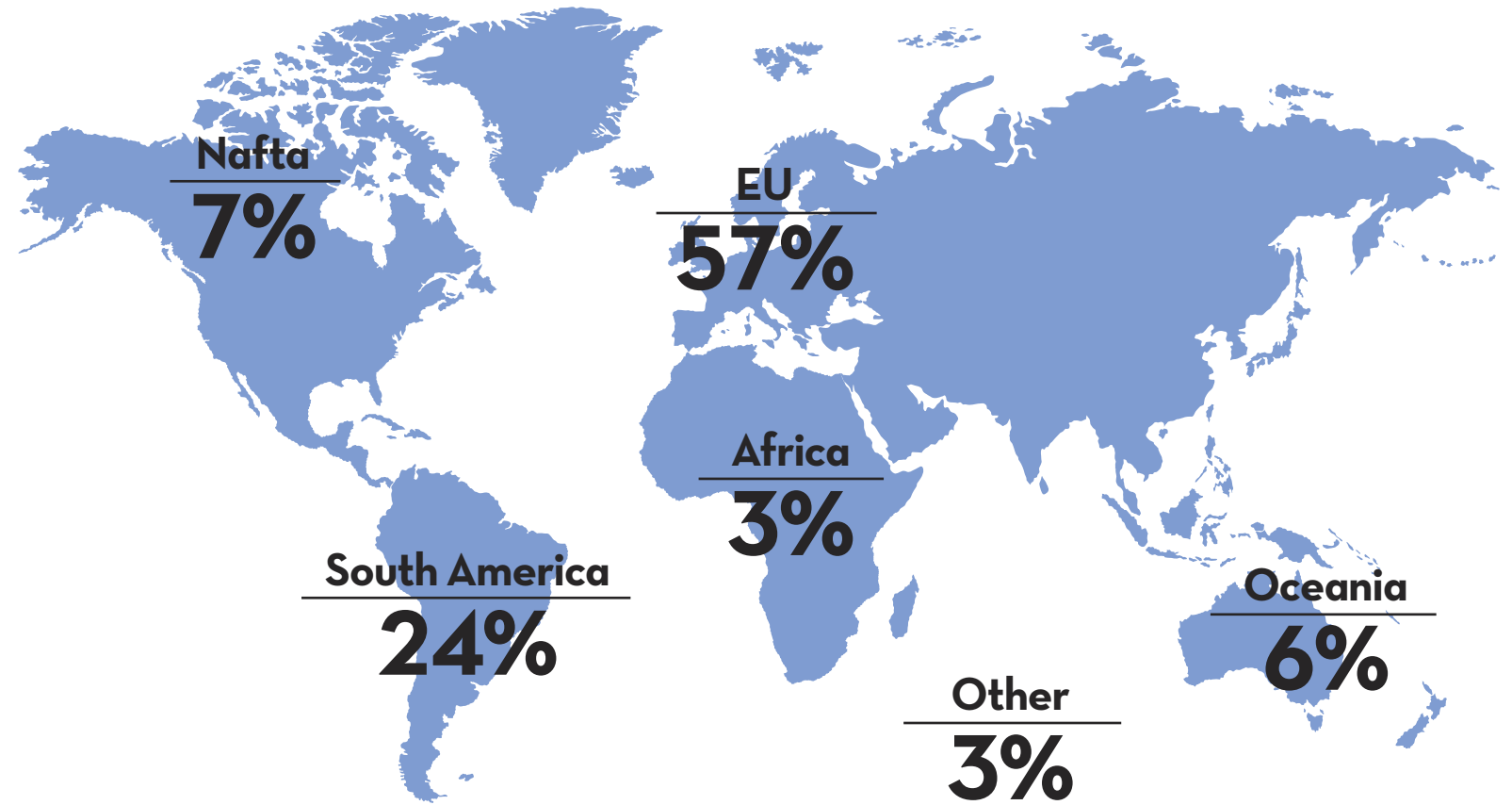
	Value 2020	Var.% 19/20	Share on total export
Romania	192.9	-21.4%	7.7%
France	174.9	-31.4%	7.0%
Vietnam	163.7	-20.2%	6.6%
United States of America	163.3	-16.2%	6.6%
China	144.4	-22.6%	5.8%
Germany	129.8	-16.1%	5.2%
Spain	125.5	-40.1%	5.0%
Portugal	122.4	-17.6%	4.9%
Poland	99.4	-21.1%	4.0%
Hong Kong	94.7	-43.3%	3.8%
Tunisia	91.8	-25.2%	3.7%
Serbia	85.3	-23.6%	3.4%
Albania	78.7	-25.3%	3.2%
United Kingdom	59.4	-28.9%	2.4%
South Korea	53.6	-7.1%	2.2%
Czech Republic	50.8	-26.4%	2.0%
Bulgaria	39.1	-26.6%	1.6%
Slovakia	38.4	-11.6%	1.5%
India	37.3	-44.9%	1.5%
Slovenia	34.3	-24.5%	1.4%
Other countries (95)	512.9	-25.3%	20.6%
Total	2,492.4	-25.4%	100.0%

value in million euros



ITALIAN IMPORT
OF RAW HIDES
& SKINS AND
SEMI-FINISHED
LEATHER
BY MAIN
AREA
OF ORIGIN

11



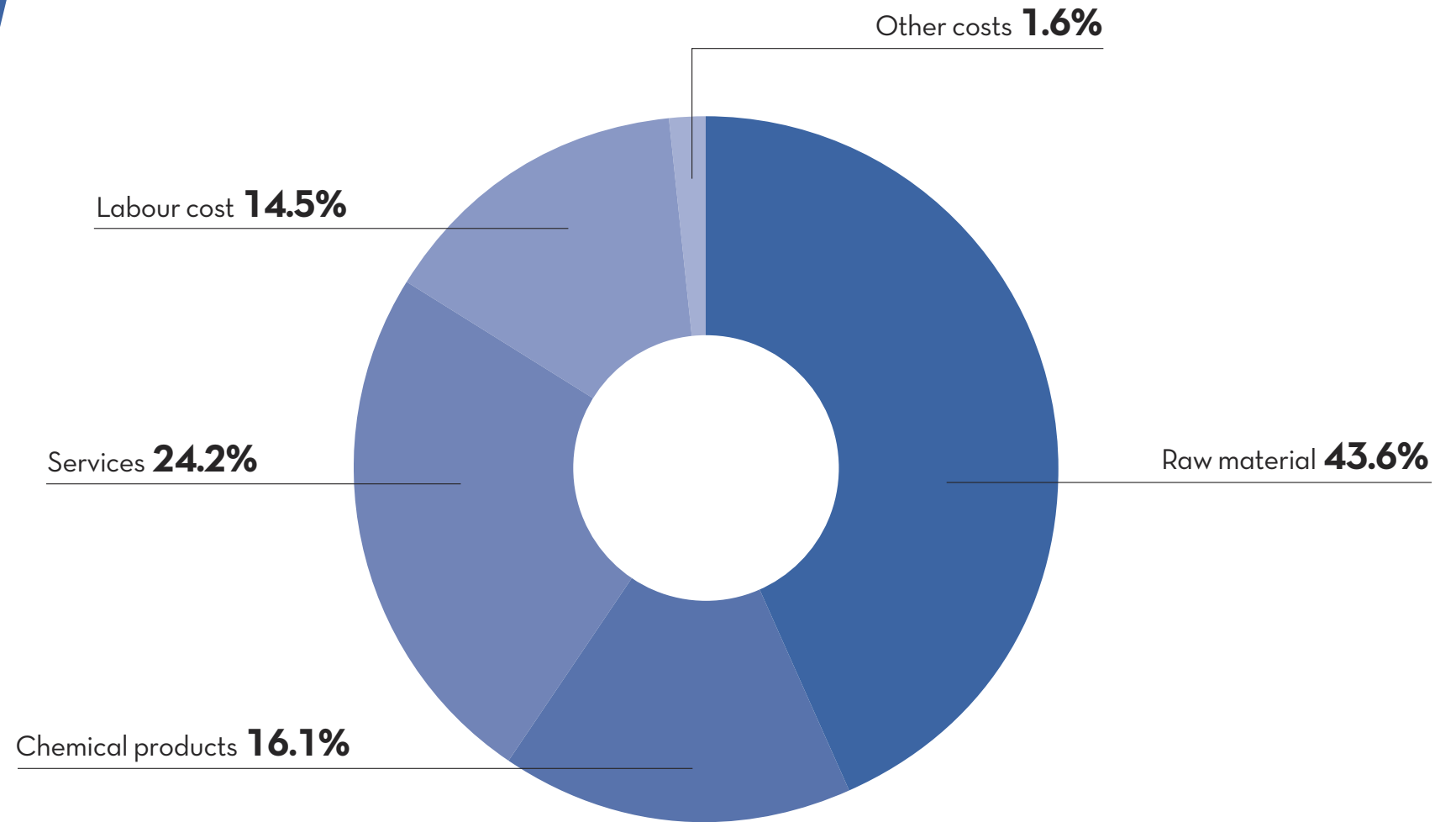
698,483 tons. ← **108** Countries

shares on total volume 2020



**BUDGET
COSTS
OF THE ITALIAN
TANNING
INDUSTRY**

12



shares on total costs 2020



TANNING RAW MATERIALS USED*

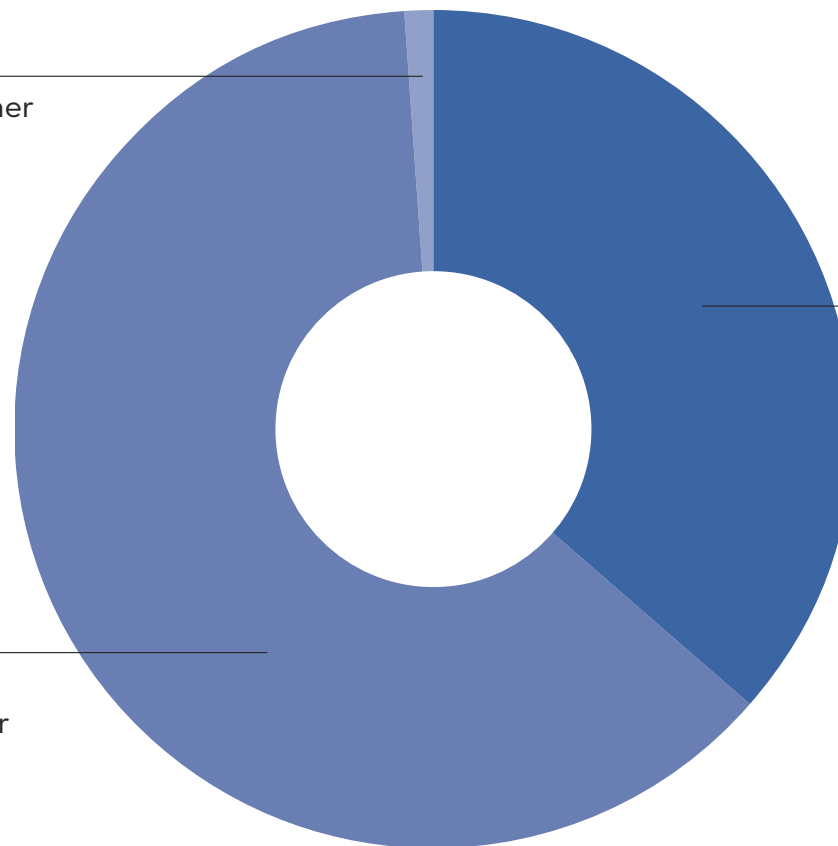
**Raw hides
equivalent volume*

13

1.1%
Crust semi processed leather

62.5%
Wet-blue
semi processed leather

36.4%
Raw hides and skins



shares on total volume 2020

